



Market Analytics: Oxo Alcohols - 2018

Market Analytics: Oxo Alcohols - 2018 is one in a series of reports published as part of Nexant's **Markets & Profitability** program.

Market Analytics: Oxo Alcohols - 2018 report provides an in-depth analysis of the oxo alcohols chain including:

- 2-ethylhexanol (2-EH)
- i-Butanol
- n-Butanol

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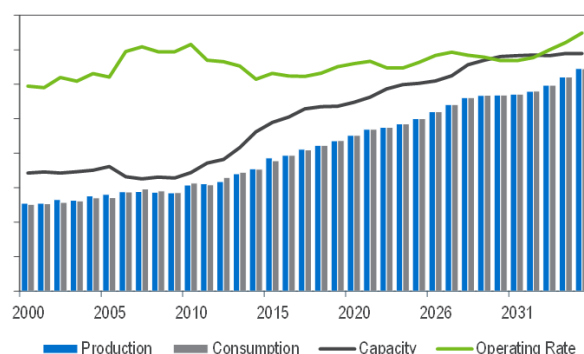
Along with the written report, Nexant's Online Database includes supply, demand and trade analysis for 40 countries and global capacity listings updated on a monthly basis.

Report Abstract:

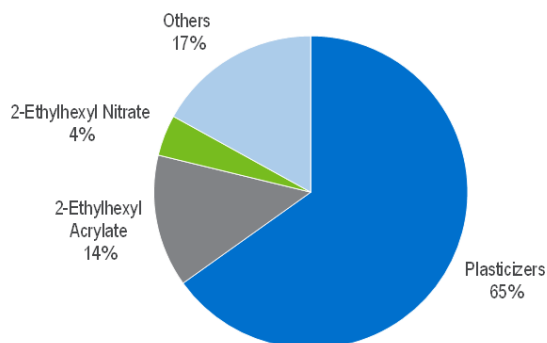
2-ethylhexanol and butanols are part of the group of products known as oxo-alcohols, which are so named because of the "oxo-process" by which they are produced. Butanols have performed better in recent years through underlying growth in the market for its key derivative butyl acrylate, mainly in water-based coatings. Isobutanol is coproduced with n-butanol, and is frequently in oversupply. Isobutanol is used as a solvent, and to a lesser extent in the production of amines. The 2-ethylhexanol market has been under pressure for several years due to health and safety concerns surrounding its main derivative; the plasticiser, dioctyl phthalate (DOP). 2-ethylhexyl acrylate is however a fast growing sector, mainly for coating and adhesives, and 2-ethylhexyl nitrate is achieving high growth as a diesel fuel additive (cetane improver).

Demand growth of 2-EH is primarily driven by the construction industry where plasticised PVC is used for flexible flooring and electrical cables and acrylates are used in acrylic resins for paints and coatings. Plasticised PVC is also widely used in the automotive industry and for various consumer and household goods. North America is considered a mature market, with high per capita plastic consumption. Changing consumer habits and public awareness are changing the plasticizer market. Emerging applications of plasticizers in various end-user industries and high demand for non-phthalate plasticizers in different regions are major factors that are expected to drive the market growth.

Global 2-EH Supply, Demand and Trade
million tons



Global 2-EH Demand, 2017-e



The massive 2-EH capacity build in China has exceeded underlying consumption growth, and the rationalisation of capacity in other regions, causing a sustained fall in operating rates over the last five years. 2017-2018 is expected to be the low point in the current operating rate cycle, and rates will increase from 2019. Oversupply is most severe in China, and should therefore deter further capacity addition for a period after the plants currently under construction are completed in 2017 and 2018. The capacity expansion in China has radically altered global trade flows. China's import requirement has now fallen to below 200 000 tons per year. Supplies from South Korea, United States, Saudi Arabia and Germany have had the largest declines, while volumes from the main supplier Indonesia have remained relatively stable.

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Chapters 3 to 5 are segmented by key region:

- North America
- South America
- Western Europe
- Central Europe
- Eastern Europe
- Middle East
- Africa
- Asia Pacific

Each region/country is further segmented by:

- **Consumption:** Assesses historic and forecast consumption; forecasts are based on projections of end use and economic activity.
- **Supply:** Includes a list of all producers, their production capacity, location, etc., and discussion of the status of new projects.
- **Supply, Demand and Trade:** Provides historical analysis and forecasts to 2035 of consumption, production, imports/exports, inventory build-up/decline, capacity and capacity utilization.

This analysis will identify the issues shaping the industry, as well as provide an independent appraisal of the market.

Subscription Details:

Subscription to **Market Analytics: Oxo Alcohols - 2018** includes:

- 12 month access via the Nexant website, to:
 - Unlimited downloads of PDF reports
 - Downloadable data in Excel from the Online Database
- Webinar
- Consultation time with the project team

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